

NIH Library

Instructional Services
presents

Reference Manager 9 (Windows)

<http://www.isiresearchsoft.com>

Training Schedule: <http://nihlibrary.nih.gov/seminars/seminarschedule.htm>

Course Objectives

1. Create, open and close a database.
2. Create a new reference, edit a reference, search for a reference, find duplicate references.
3. Import references from databases such as PubMed and Web of Science using appropriate filters.
4. Use Internet Search to search PubMed and OVID remotely.
5. Use Reference Manager with Word to insert citations into a document, and to format the document references and bibliography in different journal styles.

Overview

Reference Manager is a database program specifically developed to manage bibliographic references. Anyone involved in gathering references for research or producing bibliographies can use Reference Manager to make managing collections easier. You build a database by importing references from a text file or by manually adding references to the database or by copying references from another Reference Manager database or by connecting remotely to a database such as PubMed and importing references directly into the library.

Launching Reference Manager

When you are ready to work in Reference Manager, launch it from the Start menu, select Programs, then Reference Manager 9, then Reference Manager.



To create a new database

1. From the File menu, select New Database.
2. Browse to locate the directory in which you want to store the new database.
3. In the File name field, type the name of the new database.
4. (Optional) Click Advanced to specify a default database definition, to select a periodical synonym list to use, and to define a default sort order.
5. Click New.

To open a database using the Open Database command:

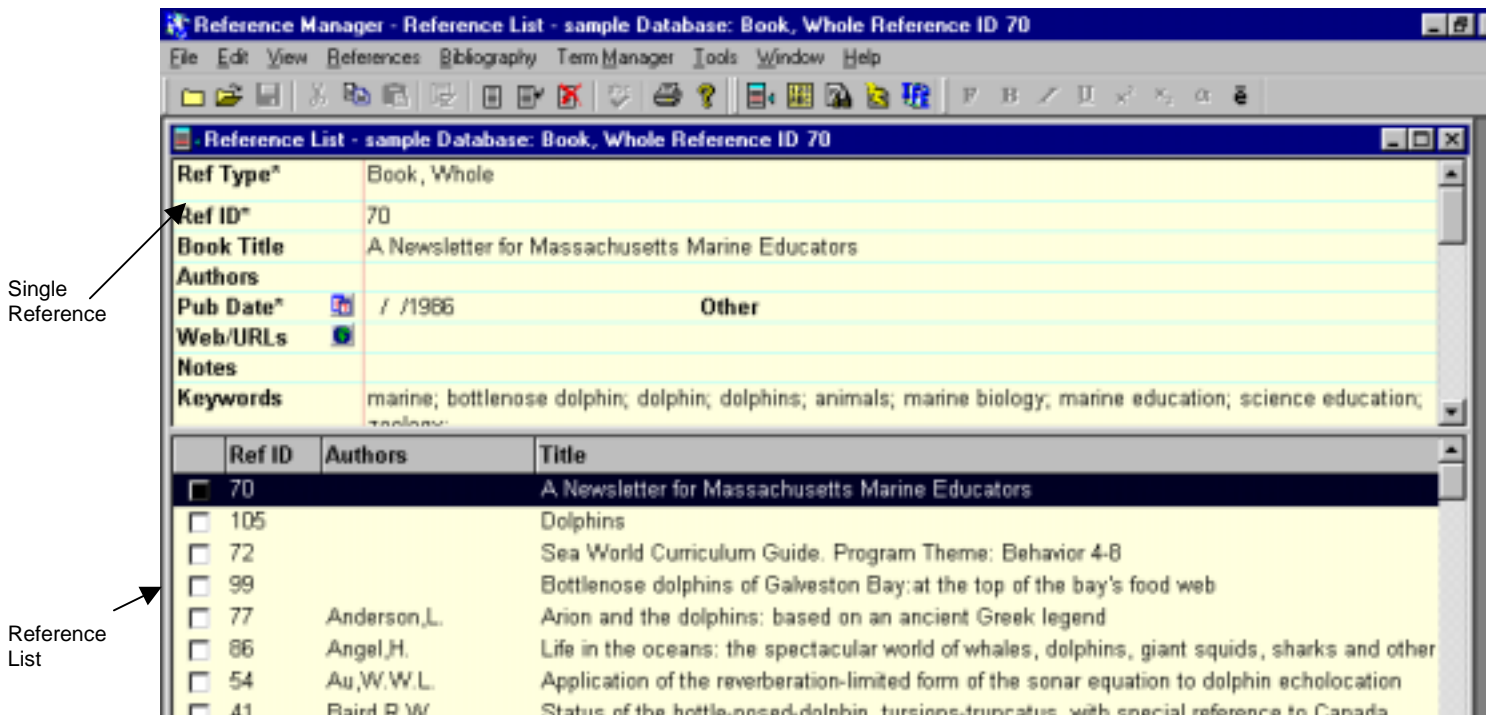
1. From the File menu, select Open Database.
2. In the File name text box, type the database name to open. Or, navigate to the desired database and highlight it.
3. Click Open.

Closing a Database

The process to close a database varies depending on what is showing on the screen. You can close one or multiple databases simultaneously.

- On the File menu, select Close Database.
- When you see the Close Database dialog, choose which database to close.

Reference List Window



To enter references manually

1. From the References menu, select New.
2. Enter information into each field as necessary.
3. When you are done entering text into each field, select Save from the File menu.

Editing a Reference

You can edit references to update information or make needed corrections (such as misspellings). Using Reference Manager Version 9, you can edit references in the Reference List window or the Reference Edit window.

From the Reference List Window:

1. Insert or move the cursor into the field, select the text, delete it or type changes as appropriate.
2. When you are finished, from the File menu, select Save.

From the Reference Edit screen (select Edit option in References)

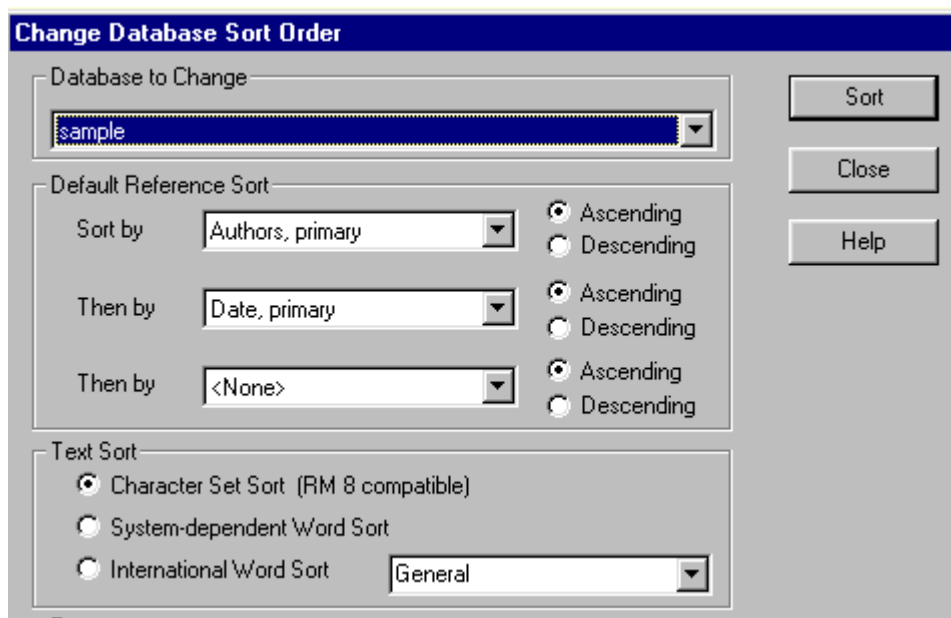
1. Insert or move the cursor into the field, select the text, delete it or type changes as appropriate
2. Click the X in the upper right corner to close the window.

Changing the Sort Order of a database

By default, the lists are sorted by author and then by date. Reference Manager lets you easily sort the list of references by any column. For the column you choose to sort by, you can sort references in ascending or descending order. If you sort using the Marked column, it sorts by marked and unmarked references.

To change the default sorting criteria:

1. Open the database to work with.
2. From the Tools menu, select Change Database Sort Order.



3. In the Database to Change field, have the database selected.
4. In the Default Reference Sort field, in the Sort by field, select the primary field to sort by, in the 'Then by' fields, select the secondary, and tertiary sort fields.
5. In the Default Text Sort box, select the default sort order option.
6. Click Sort.

Checking for Duplicate References

Reference Manager lets you check for and identify duplicate references. You select a reference to be compared with all other references in that database, or in all other databases. You are notified if one or more duplicate references are found.

To check for duplicates:

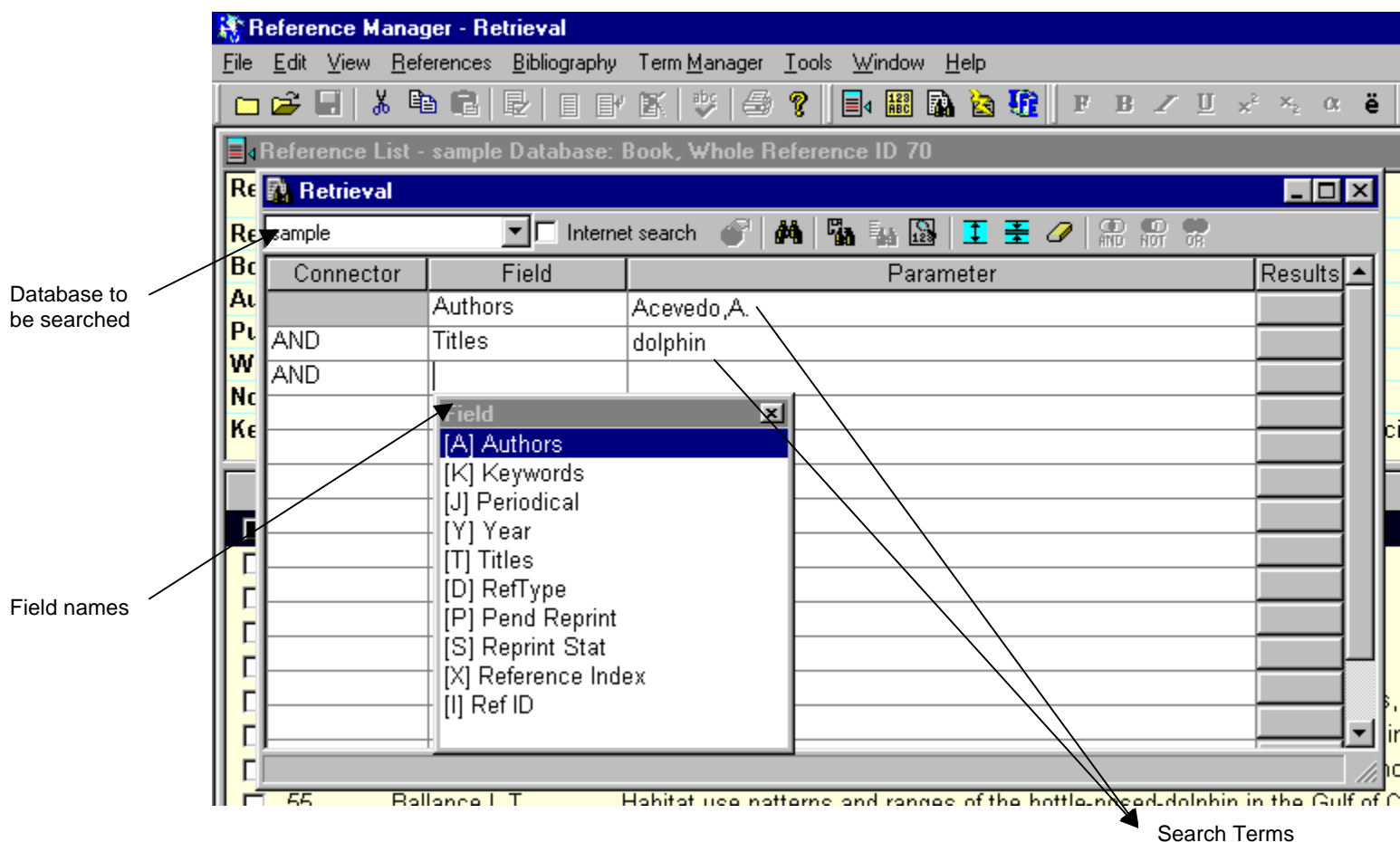
1. Select a reference
2. From the References menu, select Check for Duplicates.
3. To display the possible duplicate(s), click Yes.
4. Delete duplicate.

Retrieving (Searching for) References

The search strategy (or retrieval strategy) is the formula you create to do a search of your database, and it tells Reference Manager specifically what you are searching for. The Retrieval Strategy contains the specific combination of information you want to search on.

To search for or retrieve references

1. On the Reference menu, select Retrieve.



2. In the Select databases field, select the database from which you want retrieve a reference.
3. In order to be included in the All Databases option, a database must be in Version 8 or 9 format. An open database in Version 6 or 7 format will not be included in the search.
4. In the Field column, type or select the field to search in. Press F3 to activate the Browse list, if desired.
5. In the Parameter column, type or select the content for the field you are searching for.
6. To limit the search to a reference that contains additional specific information, add another line using a connector.
7. In the Field column, start typing the field upon which this search line is to be based. Or, press F3 to activate the browse list.
8. To view the retrieval results, click the corresponding Results button.
9. Click the Start Retrieve toolbar button to begin the retrieval.

Marking References

You can checkmark references to create a subset of references in the database. The set of marked references remain marked for that session of Reference Manager. When you exit the database, the marks are removed.

To mark a single reference:

1. Highlight a reference to mark.
2. Do **one** of the following:
 - From the Edit menu, select Toggle Mark.
 - Click the checkbox to the left of the reference.
 - With a reference highlighted, press the space bar.

To mark or unmark all references at once:

1. From the Edit menu, choose Mark All or Clear All Marks, as desired.

Entering References into a database Automatically

There are two ways to enter references into a database automatically rather than having to add them one by one manually. You can import a text file of references that you have saved from an online or web database search. Or, you can do an Internet Search to connect directly to a database through the internet and search for references using the Reference Manager Retrieve References window.

1. Importing references from a Database Service

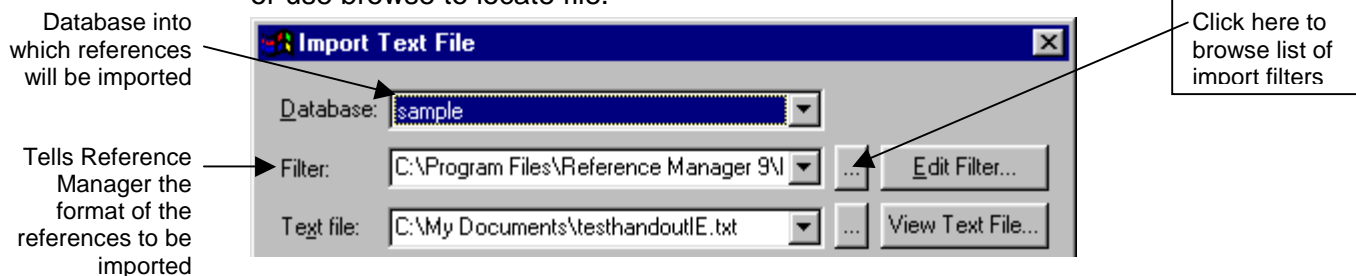
Use the **Import Text File** option, in the References menu to transfer text files of references that you have saved from online or web database services searches. The **Import Text File** module supports numerous databases, such as Chemical Abstracts, MEDLINE, or PsycInfo. For more information about how to save online or web references as a text database, refer to the help of the database you are searching or see downloading instructions at end of handout.

An **Import filter** is used to tell Reference Manager how to format and organize the text as it is imported.

- The import filter list shows the import filter definitions available in Reference Manager. As you import a text file, you choose which import filter to use.
- Each import filter is listed in the Import dialog box in alphabetical order by service name and database name. Definitions you have created or edited are displayed with an asterisk after the name. Those that come with the system do not have an asterisk. You need to know which service you are importing the text file from before starting the import function.

To import references from a database search using an import filter

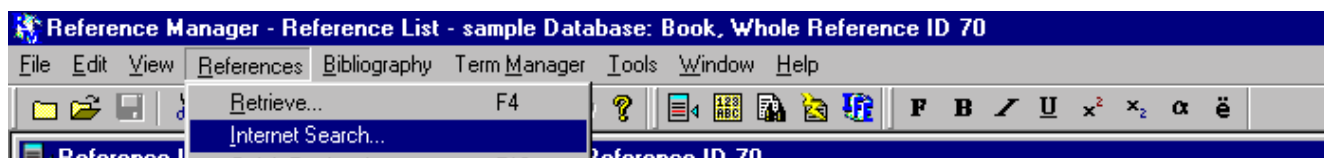
1. From the References menu, select Import Text File. Specify the name of database into which the references are to be imported.
2. In the Filter field, click Browse. Select a filter name, and click Open.
3. In the Text File field, specify the name and location of the text file of saved references or use browse to locate file.



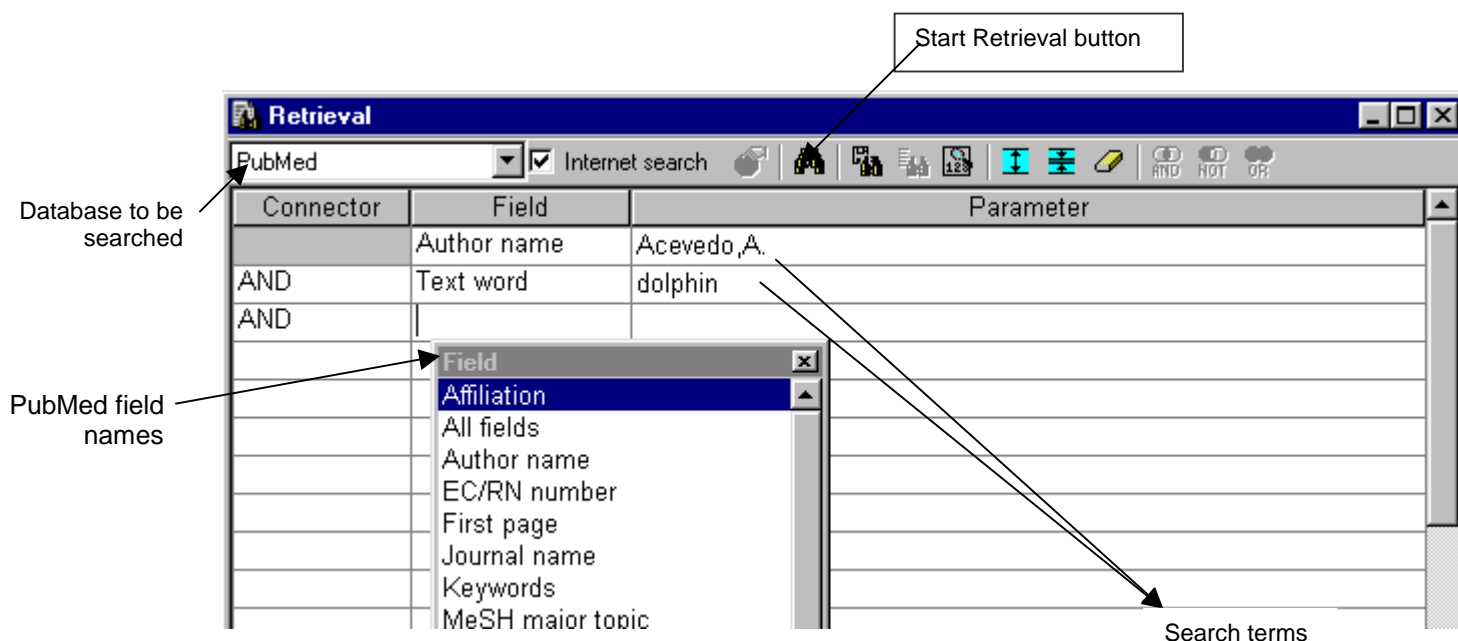
2. Retrieving References from the Internet

From the References menu,

1. Select Internet Search.



2. In the Select Database(s) drop-down, select Z39.50 or PubMed.
3. Do one of the following:
 - In the Field column, type or select the field to search in. Press F3 to activate the Browse list, if desired. In the Parameter column, type or select the content for the field you are searching for. To modify the search, add another line using a connector : AND OR NOT
 - To access an existing retrieval strategy: click the Strategy Files toolbar button. At the Retrieval Strategy dialog, select the strategy and click Load.
4. Click the Start Retrieval toolbar button to begin the retrieval.



5. If a 'results' screen appears, select a range for the number of results you want displayed.
6. Do one of the following:

To save the results either

- drag and drop them into another database
- OR copy them into another database
- OR save them as a new database (use Save As in File menu)

To NOT save the results:

- Close the results screen.

Cite While you Write

Using Cite While You Write, you can link to references in your Reference Manager databases without leaving your word processor. You insert citations into your manuscript everywhere that you need to reference a statement. Once you insert a citation, it is permanently linked to a reference in the Reference Manager database. (Remember to occasionally save your document as you insert your citations.) When you generate the bibliography, the unformatted citations are turned into formatted citations and the bibliography is appended to the end of the word processing document. Each time you add or change any form of citation in the manuscript, you need to regenerate the bibliography to update it.

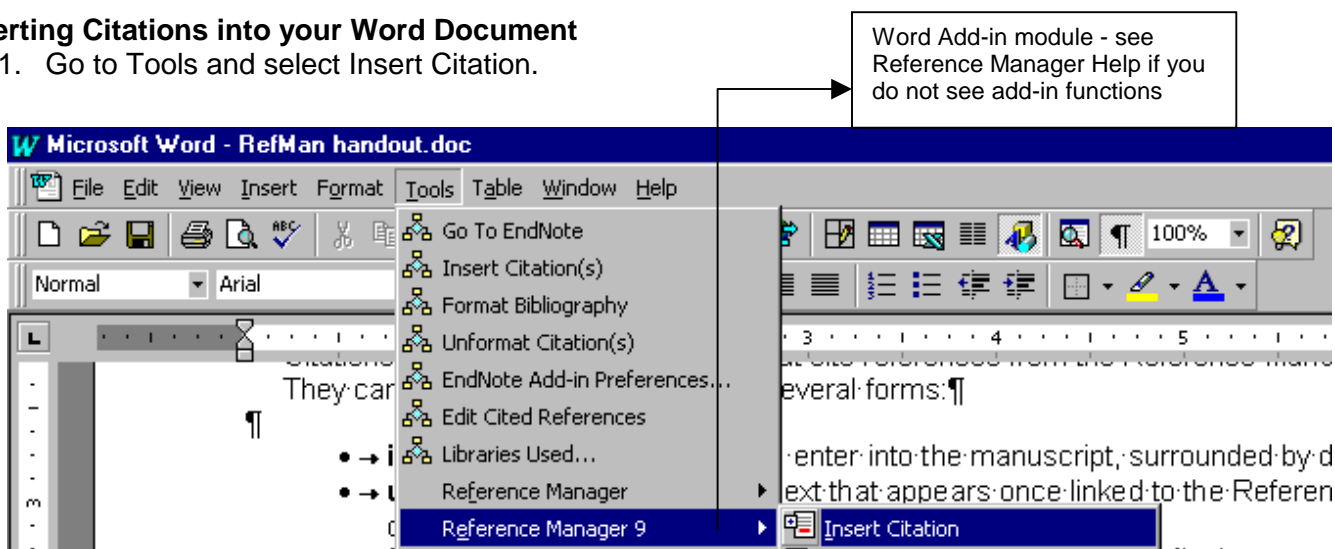
Understanding the Types of Citations

Citations are the links in a document that cite references from the Reference Manager database. They can appear in your document in several forms:

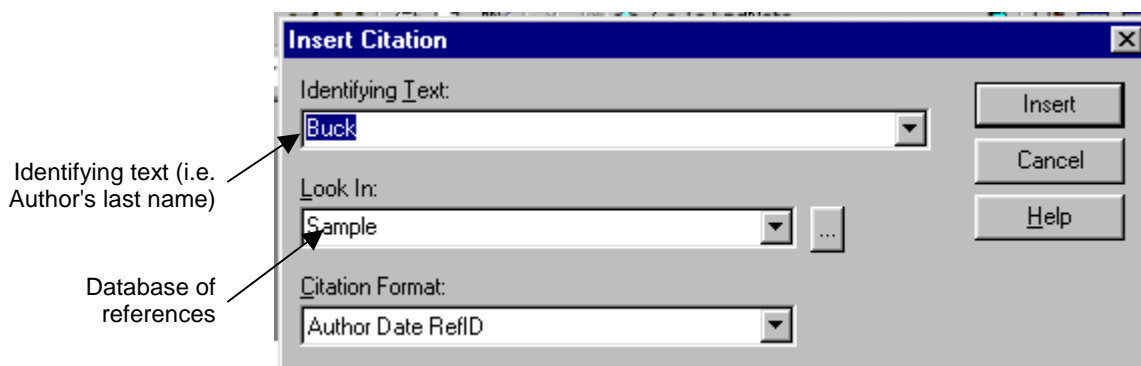
- **identifying text** as the text you enter into the manuscript, surrounded by delimiters
- **unformatted citations** as the text that appears once linked to the Reference Manager database
- **formatted citations** as the formatted text that appears in the final manuscript

Inserting Citations into your Word Document

1. Go to Tools and select Insert Citation.



2. Enter identifying text. If there is more than one reference containing the identifying text, you will have the option to choose which reference you are want to insert.



Reference Manager Downloading and Importing Formats

PubMed, Internet Grateful Med, Web of Science, OVID

PubMed

- Select specific items by clicking on the empty box to the left of a citation (if none are selected, default is all).
- Choose MEDLINE from the pull-down Display menu.
- Click the Display button
- Click on the Save button
- Save the file as .txt (e.g. medicine.txt)

In Reference Manager, choose **Import Text File** from the References pull-down menu.

- In the Import Text File dialog box, choose NLM MEDLINE as the Definition Name.

Internet Grateful Med

- Click on the Download for Disk button.
- Choose either all records or only records that were selected on the Results screens.
- Pick the option that matches your desired level of detail.
- Click on the Select Format.
- Choose "Tagged MEDLARS format (suitable for loading into reference manager programs)"
- Click on "Download Now" to save file.

In Reference Manager, from the References pull-down menu, choose **Import Text File**.

- In the Import Text File dialog box, choose NLM MEDLINE as the Definition Name.

Web of Science

****If you have not previously done so, download the Web Capture Utility.**

1. Click the Help button.
 2. Select Export > ISI/RIS Web Capture Utility > Click Here to Download > Windows or Mac version.
 3. Follow the onscreen Download and Installation Instructions.
- Select specific references by clicking on the empty box to the left of a citation or select all references by clicking the 'Mark All' button.
 - Click the 'Submit' button.
 - Click the 'Marked List' button.
 - Click on 'Export' button.
 - In the Choose Destination dialog box, select Reference Manager.
 - In the Select the Reference Manager Database dialog box, select which database into which you want to import the references

Ovid Web Gateway (see instructions for specific browser)

Using Internet Explorer

- Select specific items by clicking on the empty box to the left of a citation.
- Scroll to the bottom of the page until you reach the "Citation Manager."
- Choose the "Reprint/Medlars" option.
- Click on the "Display" option.
- From Explorer's File menu, choose Save As. Save the file *.txt.

In Reference Manager, choose **Import Text File**.

- In the Import Text File dialog box, choose Ovid Online (Reprint) [FJ] as Definition Name.

Using Netscape Navigator

- Select specific items by clicking on the empty box to the left of a citation.
- Scroll to the bottom of the page until you reach the "Citation Manager."
- Choose the "Reprint/Medlars" option
- Click on "Save". Save the file *.txt

In Reference Manager, choose **Import Text File**.

- In the Import Text File dialog box, choose Ovid Online (Reprint) [FJ] as Definition Name

Ovid Windows Interface

- Click on Save button.
- Choose Save Documents.
- Select Options.
- Highlight Output format and click on Modify.
- Highlight Reprint.
- Save citations.

In Reference Manager, choose **Import Text File** from the References pull-down menu.

- In the Import Text File dialog box, choose Ovid Online (Reprint) [FJ] as the Definition Name.